See below for an overview of the changes being rolled out in the Tool for July 27th:

#1: Assessment Updates

1. **Assessment responses now default to blank** to help improve accuracy. *Previously recorded assessments will retain their previous responses but may appear with blanks until updates are completed. All current contacts are completed.*

2. **Agreement is now a mandatory field** and serves as the source for "Last Assessment Date." **The "Last Assessment Date" field** on a contact's profile will now accurately reflect the most recent completed assessment date.

3. **Assessment emails and texts are now automatically tracked as activities** within Timeline/Activities;. The timeline can be used to confirm that the text or email went out. Please note that the system does not have the functionality to send these items manually. *(No action required.)*
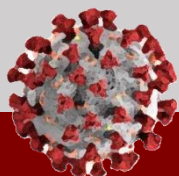
1 Blank Response Defaults

2 Agreement/Last Asmt. Date

3 Timeline/Activities

See below for an overview of the changes being rolled out in the Tool for July 27th:

#2: Household Contacts & Minors

[REVIEW THE UPDATED JOB AID](#) for detailed instructions. Basic capabilities listed below:

1. **"Household" records to classify a group of contacts can now be added** from the "New Contact" screen by toggling the "Household" button and providing the necessary information. Household name, address, and contact information can be added here, and the "Household Members" tab can be used to store a group of contacts.

2. **Do not create households from contacts –** first create the household, then add members using the "Household Members" tab.

3. **New contacts can now be added directly to this household** by visiting the "Household Members" tab and selecting "New Contact" at the right. A quick create screen will appear, and **you will not have to re-enter contact or address information.**

4. **Existing contacts can be incorporated into this household** by visiting the "Household Members" tab and selecting "Add Existing Contact." *These contacts will not take on the household's address or contact information.*

5. **Relationships within a household (e.g. parents, children) can now be indicated** in the "Household Relationship" field.

6. **"Is Minor"** can now be indicated at the bottom of a contact's profile without utilizing the "Notes" field.

7. **The "My Active Households" view will show Household units in aggregate,** while contacts within households will still display as regular contacts.

1	**Adding Households**
2	**"Household Members"**
3	**Adding New Members**
4	**Adding Existing Contacts**
5	**Household Relationships**
6	**"Is Minor" Option**
7	**Households View**
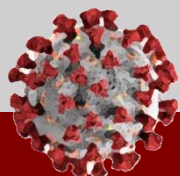
NOTE: Do not enter any household information before selecting the "Household?" toggle.

Please review the updated ["Handling Household Contacts"](#) job aid for detailed instructions.

See below for an overview of the changes being rolled out in the Tool for July 27th:

#3: Contact Profile Improvements

1. **Fields have been reorganized under new headers** for ease of use.

2. **"Contact who became a case"** now exists as a third option under "Contact or Case Patient."

3. **"Tested Positive – Became Case"** is now included as an option in "Final Monitoring Outcome."

4. **"Monitoring End Date"** is a new field that you can manually input and use for your reference throughout monitoring.

5. **NC EDSS Event ID of Source Patient is now a searchable field** from the Contacts Tab.

6. **Timeline/Activities will now automatically update with the content and timestamps of automatic text or email outreach** for your reference. You do not need to close out or review these items.

❶ Reorganized Fields

❷ "Contact who became…"

❸ "Tested Positive…"

❹ "Monitoring End Date"

❺ NC EDSS Event ID Search

❻ Timeline/Activities Update

❶
HB Hannah Banana
Contact

ARIAS Contact | Assessments | System Information | Related

Basic Info

Household? — No

🔒 C# — C-0000033011

First Name * — Hannah

Last Name * — Banana

Household — Look for Household

Household Relationship — ---

Contact Information

Country Code — ---

Mobile Phone (will be used for text messages) — 1-800-555-5555

Phone #2 — ---

Phone #3 — ---

For Public Health Use Only

Contact or Case Patient — Contact

--Select--
Contact
Case-Patient
Contact who became a case

❷

NC EDSS Event ID of Case (Use the number portion of

Final Monitoring Outcome — Fully Complete

--Select--
Refused
Never Reached
Partially Complete
Fully Complete
Other
State OOJ, notification completed
Tested Positive - Became Case
Negative

Referred to Test?
Referred to Test Date
Tested?
Test Date
COVID-19 PCR

❸

❹ Details

Begin Monitoring? — Yes

Monitoring Status — Monitoring

Monitoring End Date — 7/31/2020

❺ ▽ | 101222333 ✕

Email ▽ | Mobile Phone ▽ | Local

❻ Timeline / Activities

Timeline ＋ ▽ ⋮

🔍 Search timeline

Enter a note...

✉ Email from
Daily Public Health Survey
Hello Arthur, This is the North Carolina Department of Health and …
Closed 8:10 AM

Note that these updates are for your reference only and that you cannot use Timeline/Activities to send email or text outreach.